C1200-5A

A BILL PUBLICATION FAST FOOD

Restaurant Business

MAY 1, 1985

Restaurant Business

May 1, 1985 VOL. 84 NO. 7

Contents

COVER STORY

Foodservice 2000

What will the world—and foodservice in particular—be like in the year 2000? While no one claims access to a crystal ball, RB editors posed that question to dozens of experts and came up with an intriguing and thought-provoking vision of the future 207

MENU IDEAS

Breakfast and brunch
Many operators—realizing the profit potential and consumer demand for breakfast and brunch—are opening their doors and offering a variety of morning and mid-day delights 259

FEATURES

The Levy Organization
Through multiple unit locations, this Chicago-based real estate/restaurant concern is set to grow from a group of 22 units and sales of $35 million to 39 units and $50 million in sales 136

Business Executives Dining Awards
Executives pick their favorite dining establishments 154

Highwood
This tiny Chicago suburb has somehow attracted more than its fair share of culinary talent 156

Taste of Chicago
A tabletop tour of the NRA Show's host city: What's new, what's changed, and what will always stay the same 174

Four Seasons
This Toronto-based luxury hotel chain, catering to upscale business travellers, emphasizes quality and personalized service 188

America
This new, trendy restaurant in New York City is a flag-waving tribute to this nation's bounty: The menu boasts over 95 entrees and 20 appetizers 200

Joe's Barn
Can you top this? Mother's Day customer counts for this Kansas restaurant equal 13.5 customers per minute; 7,328 for the day 267

Bar design
Part III of this special series on the elements of bar design discusses entertainment and entertainment programming 268

T. J. Applebee's
W. R. Grace's adult fast food/dinner house concept is polished and ready to expand. With a check average of $6, the average unit grosses $1.4 million 274

DEPARTMENTS

Training Tips 2

RB Insights 15

RGI Spotlight
Cleveland 16

Editorial
A tradition of quality 22

Publisher's Memo
A fond farewell 28

Up Front 32

Menu Planners Guide 74

Personal Finance
A look at unit trusts 92

Management Psychology
The career crisis 96

Operations Savvy
The show must go on 104

Tax Bite
Auto expenses 114

Trade Quotes 127

Taking Stock
Avoiding poor performers 128

Raising Your Equipment I.Q.
Toaster talk 242

Drafts, Carafes & Spirits
Bar snacks 247

Bar Management Guide 252

Calendar 254

Buyer's Circle 280

Classifieds 303

Lateline 307

RB Eyes Washington 311

Restaurant Openings 312

Cover design by Mike Delia; cover illustration by Mark Kaplan.

continued from page 46

Ad Age cites burger ads

In a move that can only intensify the Battle of the Burgers, the editors of *Advertising Age* included all three top-tier burger companies—Wendy's, McDonald's, and Burger King—in its 24th annual selection of "The Best TV Commercials of the Year." A total of 78 commercials from all sectors of business were cited as having met *Ad Age*'s criteria of "exhibiting creative flair and demonstrating marketplace effectiveness." Fourteen hundred entrants were viewed.

The fast food kudos went to Wendy's now-famous "Where's the Beef?" (created by Dancer Fitzgerald Sample); to McDonald's "Stranger in the House," (Leo Burnett Co.); and to Burger King's "The Facts of Life," with its squealing-and-groaning young girls comparing broiling with frying (agency: J. Walter Thompson USA).

According to *Advertising Age*, winning spots were typified by such characteristics as "unusual, attention-grabbing ideas that strongly identify with the product; excellent writing, acting and directing; good music and top-notch photography.

El Pollo Asado franchise

Pizza Inn Inc., of Dallas has signed a franchise agreement with El Pollo Asado Inc., Phoenix, for the conversion of a Pizza Inn unit in Phoenix to the El Pollo Asado fast food chicken concept. According to F.J. Spillman, president of Pizza Inn, the agreement will give the company the opportunity to experiment with converting a marginal unit to a concept which has proven successful in a new market niche. "Many customers are looking more and more to fast food concepts to offer healthy, nutritious and tasteful food, lower in calories and cholesterol. We believe the El Pollo Asado concept meets the market need as well as offering our company an additional opportunity for expansion and redeployment of assets."

El Pollo Asado, founded in 1983, specializes in charbroiled chicken marinated in fruit juices and herbs and spices. With five company and four franchised units, 1984 revenues totaled $785,000; revenues for the first three quarters of fiscal 1985 were nearly $1.85 million. El Pollo Asado has announced signing of commitments for 18 additional restaurants.

Fast food ad spending

National fast food chains increased radio advertising expenditures by 36.5 percent in 1984, ac-

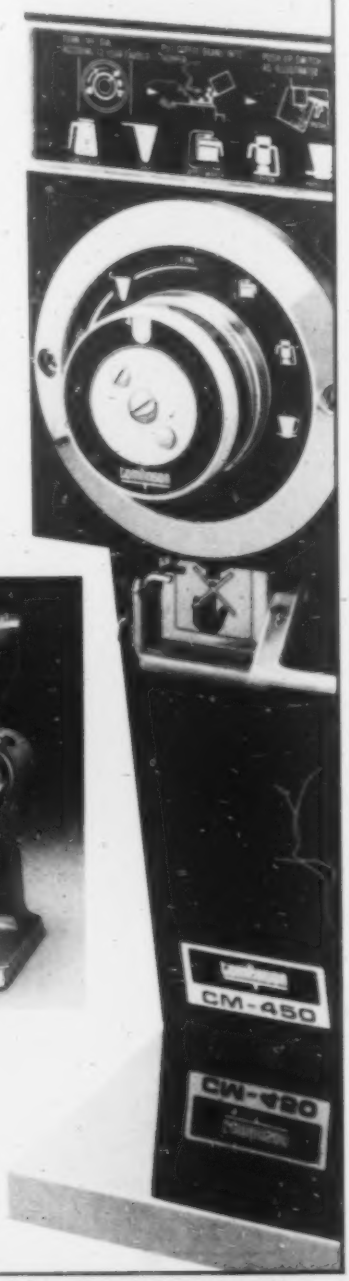
continued on page 53

Take a
FRESH
approach

Tomlinson coffee grinders give you more ways to go with a greater model range and a better grind selection. There's fresh economy, too, with a low price.

Whether it's contemporary or traditional styling, there's a model designed with space saving dimensions to attract customers. Settings for extra fine to coarse plus in between. A cool, quiet 1/2 hp motor that's protected against overheating. Specially machined steel burrs that provide superior grinding action. And many other features.

No matter how you approach it, Tomlinson has the quality, choice and low cost you want. Contact us today for details.



tomlinson

TOMLINSON INDUSTRIES
No-Drip Faucet Division
13700 Broadway • Cleveland, Ohio 44125-1992
Phone: 216-587-3400 Cable: NO-DRIP
Telex: 985409 Tomlinson GHTS

See us at NRA Booth #2721

For information circle number 180

For information circle number 27 ➔

continued from page 48

cording to a recently-released report by the Radio Advertising Bureau (RAB). Total expenditures were $87.9 million in 1984, up from $64.1 million in 1983.

Pillsbury led all radio advertisers, spending $11.9 million in 1984 to advertise its Bennigan's and Burger King subsidiaries, a 29.6 percent increase over 1983. Other leading chains advertising on radio were Pepsico for Taco Bell, with a 145 percent increase to $8.8 million; Ralston Purina for Jack-in-the-Box, an 18.7 percent increase to nearly $8 million; McDonald's, reflecting an 84.2 percent increase to $3.8 million; and Black Angus, up 37.2 percent to $2.6 million. Church's increased its 1984 spending by 408 percent, to $2.33 million; and Horn & Hardart upped spending for Bojangles' by 417 percent, to $1.8 million.

"Radio is a natural vehicle for fast food advertising," comments Kenneth J. Costa, vice president of marketing information at the RAB. "Radio moves with the customers and reaches the prospective customer closest to the point-of-purchase."

continued on page 54

Top 20 Fast Food Radio Advertisers

Chain	1984*	1983*	% Change
Pillsbury Co. (total)	11,974.0	9,235.7	+ 29.6
(Bennigans)	7,975.1	4,816.8	+ 65.6
(Burger King)	3,951.6	4,306.2	- 8.3
PepsiCo (Taco Bell)	8,791.8	3,586.5	+145.0
Ralston Purina (Jack In The Box)	7,919.3	6,672.6	+ 18.7
McDonald's	3,827.4	2,077.3	+ 84.2
Domino's Pizza	2,750.5	3,277.4	- 16.1
Black Angus	2,582.1	1,881.4	+ 37.2
Krystal	2,517.7	1,653.6	+ 52.3
Victoria Station	2,516.8	1,440.8	+ 74.7
Church's	2,332.9	458.9	+408.4
Hardees	2,286.8	2,296.6	+ 0.4
Horn & Hardart (Bojangles)	1,810.6	350.1	+417.2
Round Table Pizza	1,677.8	1,196.0	+ 40.1
R. J. Reynolds (KFC)	1,594.3	976.3	+ 63.3
Dunkin' Donuts	1,469.4	382.9	+289.0
Carl's	1,471.1	809.8	+ 81.7
Denny's/Winchell's	1,419.8	850.3	+ 67.0
White Castle	1,412.7	1,361.6	+ 3.8
Marriott (Roy Rogers, Big Boy)	1,405.0	690.6	+103.4
Howard Johnson's/Ground Round	1,313.3	1,365.0	- 3.8
Chick-fil-A	1,144.2	574.9	+ 99.0
Total Restaurant Category	[illegible]	[illegible]	[illegible]

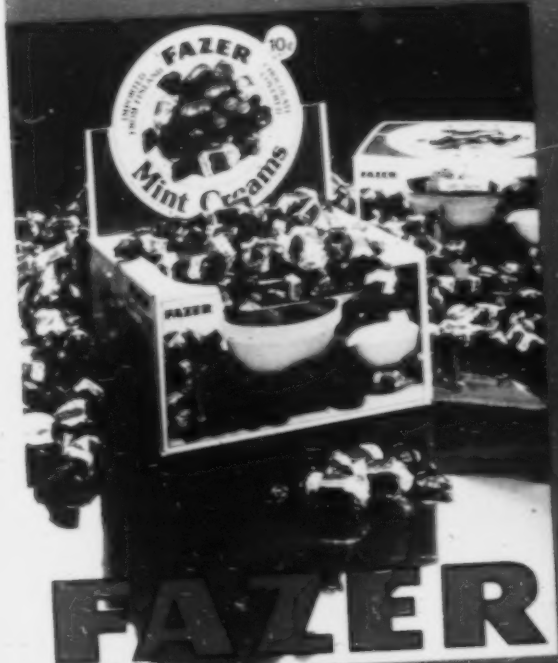
*Figures in thousands

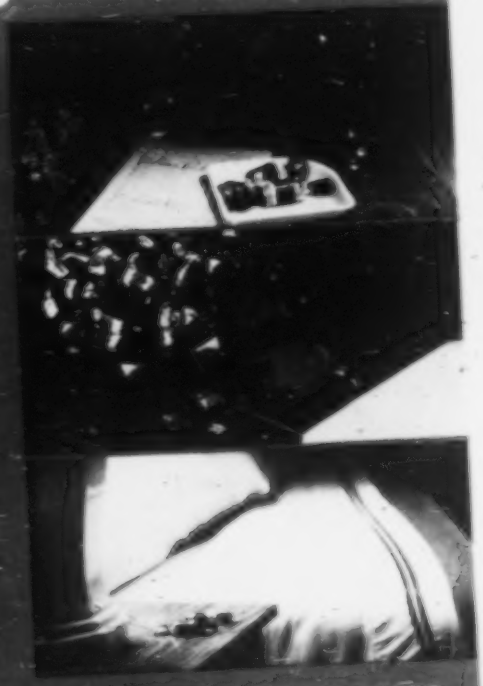
TASTE THE UNIQUE MINT

FAZER

Mint Creams

Introducing chocolate covered mints with a uniquely delicious semi-liquid filling. For further information contact Fazer Chocolates or your local distributor.





FAZER

FAZER Chocolates Inc., 8124 West Third St., Los Angeles, CA 90048 (213) 658-5252

See us at NRA Booth # 2025

For information circle number 181

FOODSERVICE 2000

What will the world—and foodservice in particular—be like in the year 2000? RB editors Alexa Bell, Rona Gindin, and Joan Lang posed that question to dozens of experts, in and out of the industry. The result: Many intriguing observations and thought-provoking ideas. While no one can claim access to a crystal ball, some distinct impressions emerged. The market's bound to be a tough one, with chains and independents, fast food and fine dining, jostling for the attention of a consumer who will be older, busier, richer, and wiser. Technology will lend a hand; so will a global distribution system in which almost anything can be at the back door in a trice. There will be fewer teenagers to make up the labor pool, a situation which may or may not be ameliorated by an influx of immigrants. The concept of mass marketing, in an era when society will be highly fragmented and specialized, will be nearly useless. People, exposed to the experiences of the entire world by a burgeoning network of information, will suffer no shortage of quality and service. One thing is certain about the outlook for the future of foodservice: to succeed in 2000, everything you do had better be done right!

If you think today's customer is demanding, you haven't seen anything yet. Tomorrow's customer is going to be *really* fussy. He'll demand greater choice, more service, better quality, and food when he wants it and where he wants it.

Forget about foodservice on Alpha Centuri, pellets that turn into pickled beets, and a robotic maitre d'. Although these may all be feasible—technically—in the year 2000, your customer isn't going to want them. What he is going to want is what he has always wanted: quality, variety, value, convenience, and service. Only more so. You, however, will have myriad new ways to make these demands possible. Just imagine...

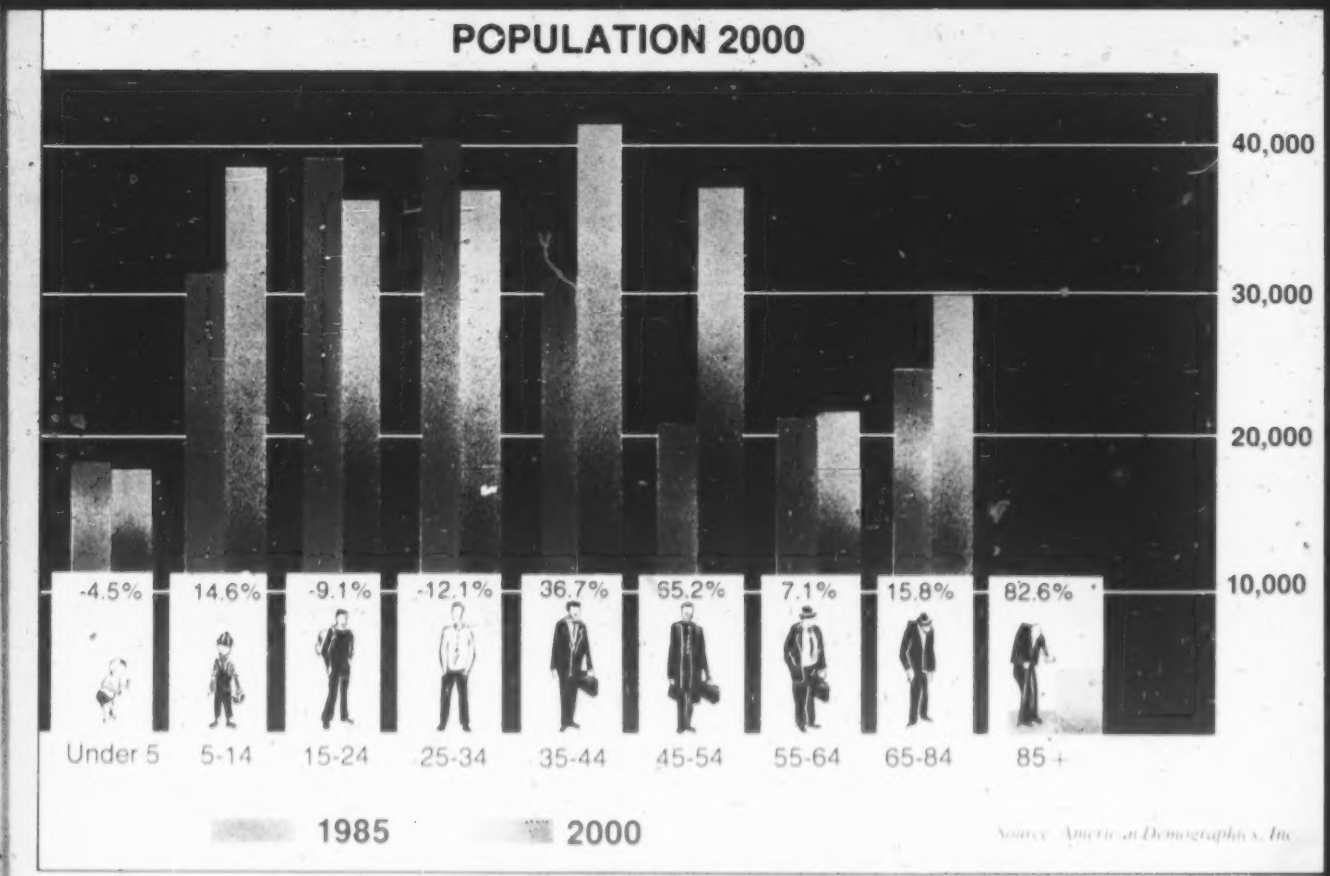
- Dashing out for lunch, tomorrow's consumer drives his solar-powered car to a fast food outlet known as FreshFast. He inserts his money card and inputs his lunch choice directly onto a sensitive membrane screen. The menu board, which lists a wide variety of foods ranging from fresh soy products to fruit juice, hamburgers and teriyaki, displays nutritional information about each item. The amount of the bill is deducted electronically from his checking account, and seconds later his order comes up through a rotating drum, packaged and ready to go. His receipt contains both total expense and calorie count.
- Preparing for dinner, a woman turns to the computer on her desk. She calls up the file for Getaway Gourmet, a citywide take-out and delivery service. She reads the menu on her screen, and selects two orders of linguini, salad of radicchio and white asparagus, and chablis for herself and her husband. For her son, she orders fettucine, salad, and a soft drink. At 7:30 that evening, the Getaway Gourmet truck pulls up at her door and a smiling young man enters her house with a thermostable carton. Inside, the hot food is hot, the cold food is cold. Included with the meal is a rose in a clear disposable vase.
- Across town, a couple is celebrating an anniversary at their favorite restaurant. The new cuisine is being served—the critics have dubbed it "Cosmopolitan Cuisine"—that combines the best of all possible influences from around the world. The decor is intensely sensual, with intimate booths, richly colored surfaces, and comfortable, deep cushions. The service is also extremely personal, and there are no computers in sight. This restaurant is shaped like a semi-circular theater, and at center stage is renowned chef Jacques Tsu, creating his art in an exhibition kitchen.

Consumer 2000

If you think today's customer is demanding, you ain't seen nothin' yet: Tomorrow's customer is going to be *really* fussy. He will demand greater choice, more service, better quality, and food when he wants it and where he wants it. He will continue to eat both at home and at work, but when he goes to a restaurant he will want the highest artistry possible. He will want restaurants that accommodate his busy lifestyle, and when he's older, restaurants that meet his dietary and social needs. He will even have more money to get what he wants.

If there is any one thing that the market statistics tell us, it's that the consumer is changing. Of particular note is the fact that he's aging. According to the U.S. Bureau of the Census, the estimated median age of the population as of July 1985, will be 31.4 years; by 2000 it will be 36.3. This increase is due to the shifting age group structure of the population as the huge baby boom generation matures and the fact that the birth rate is declining. By 2000, in fact, the group aged 35 to 54 is expected to swell by more than 26 million and traditionally, these "middle aged" are in their prime earning years and spend more on away-from-home dining.

Many experts point to the "graying of America," and indeed, the ranks of men and women aged 65



and over are swelling more than any other. In fact, by 2000 there are expected to be nearly 5 million people over the age of 85—the fastest growing age group—and something like 100,000 people over the age of 100. The opportunities for health and retirement care are obvious, but considering lifestyle changes emphasizing fitness and wellness, coupled with certain medical advancements, there are going to be a lot more healthy active seniors around with the time and inclination to eat out.

Certain segments of the population—notably teens and young adults aged 15 to 24, and people in the 25-to-34-year-old market—will decline in number, causing many experts to predict a shortfall in the entry-level labor force and a "buyer's market" in which employees will have more leverage than employers. Moreover, by 2000, employment alternatives such as flex time, part time, and time sharing (two employees filling a single job), are expected to be much more prevalent. It is important to note, however, that a liberalized view towards immigration and advances in technology and productivity might take up the slack.

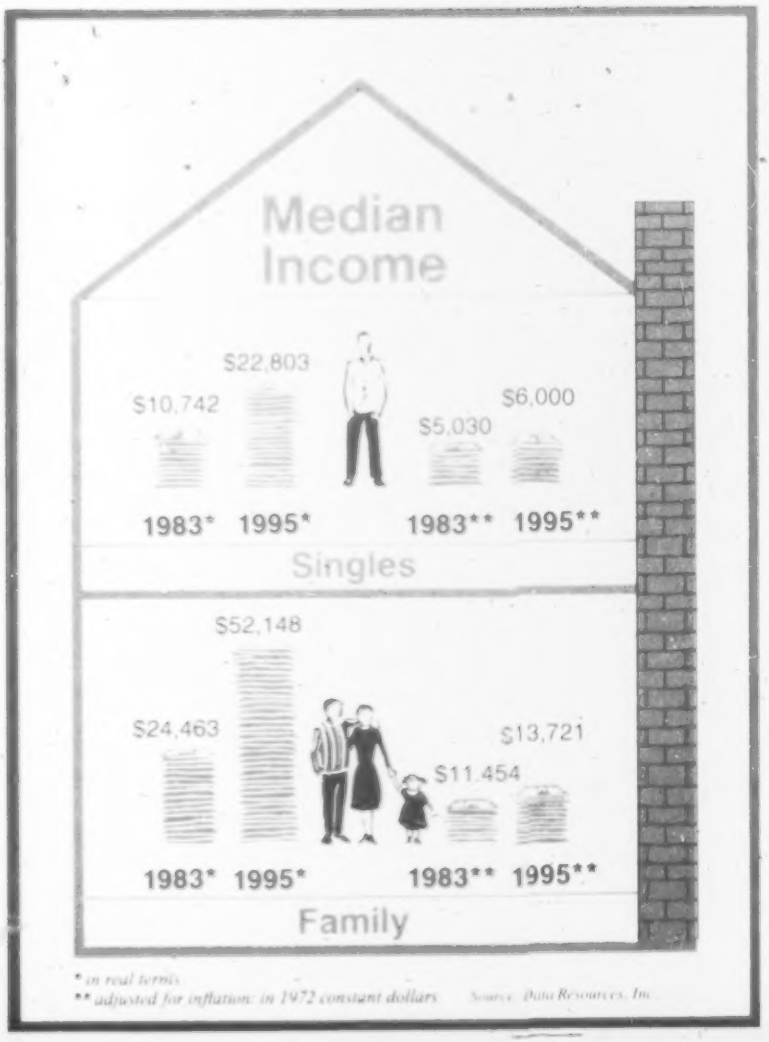
There will be almost 7 million more women than men in the year 2000, compared to 6.3 million now. *American Demographics* magazine publisher Peter Francese believes that in that year, women will have the majority in the workforce as well. Many believe that within 15 years, women's salaries will have caught up with men's, particularly since women entering the workforce in the 60s and 70s were relegated to such "soft" tasks as communications, planning, and personnel, all of which will be crucial components of the service-based economy of the next several decades.

The share of women who are working is increasing dramatically: According to Melinda Skaar, an economist with Data Resources, Inc., 58.7 percent of the female population aged 16 and over will be working or actively seeking employment in 1995, compared with 53.6 percent last year and only 43.3 percent in 1970.

CHART BY BOB CONRAD/ANDREA GELLER

Today's shifting family and household income patterns imply more discretionary dollars in 2000. Birth rates are dropping and more couples are delaying childbirth, a pattern which can be expected to continue given women's continued place in the workforce. Moreover, if present trends continue, there will be many more "nontraditional" households: more singles (divorced or never-married) living collectively and alone, and more one-parent-headed families. Although the number of marriages is higher today than a few years ago, the number of married couples with children has actually been declining. Best of all, median family household income is expected to trend upwards: in 1983, income was $24,463; by 1995, it should hit $52,148. (In 1972 constant dollars, this equates to $11,454 and $13,721, respectively—an increase of nearly 20 percent.)

In addition to these shifts, the population will also change geographically. Americans are headed South and West—although at a slower rate than in the 1970s—to California, Texas, and Florida, and to Arizona, the Carolinas, Virginia, and Tennessee. Though some cities in the Northern industrial states will lose citizens, the population decline these areas suffered during the 70s has been reversed somewhat, in part because the 80s' baby boomers have fueled an "urban renaissance" in many older downtowns.



* in real terms
** adjusted for inflation: in 1972 constant dollars. Source: Data Resources, Inc.

The big news, however, is the growth of the nonmetropolitan area. According to Michael Annison, founder/president of the trend-spotting Westrend Group Ltd. organization, by 2000 there will be more population in so-called "secondary cities" and smaller communities outside but within 50 miles of major cities as employers escape the escalating costs of doing business in urban areas. Services—including restaurants—will follow.

The profile of regions is also changing. For instance, by 2000, the majority of the country's older people will be in the more stable heartland. Half of the jobs in the U.S. will be located in just 30 metropolitan areas, mostly in the South and West, according to the National Planning Association, including large metropolitan areas like Houston, Los Angeles, and Denver, and rapidly growing smaller cities like Austin, Tucson, and Raleigh-Durham. Moreover, continued immigration of foreigners, particularly Hispanics and Asians, will drastically affect the population mix of many states.

Consumers in 2000 will display distinctly cosmopolitan values and habits, as ours will be a global society. Travel, education, and a burgeoning supply of information—via computers, satellites, videos, and the printed word—will enable most consumers to share in the experiences of the world. Transportation systems that bring fresh foods overnight to America's cities from all parts of the

world—along with every sort of import—will adapt consumers to a perpetual cornucopia of goods.

Most experts agree that consumer interest in health and fitness is here to stay, and the consumer of 2000 will definitely want that option. It won't be health food in the sense of carob and macrobiotic sprouts however, as Taco Bell marketing senior vice president Larry Higby points out. "We're talking about fresh, nutritious food which tastes good," he insists. "Taste will still be the critical factor." Long-term historical trends away from items such as beef and pork and towards vegetables, fruits, poultry, and fish, may very well continue. Also likely will be smaller but perhaps more frequent meals.

According to Corinne Kuypers Denlinger, vice president of the Naisbitt Group, because more people will be working they will be making far better use of their time, particularly their leisure time. Anything that is convenient or time-saving will appeal, and all aspects of the leisure industry will grow, including travel.

The role of the home will change, but so will the role of public places such as restaurants. Many factors point to busier lives—the continuation of the two-career family, an increase in the number of women reaching executive status and spending more hours on the job, the need to devote time to children outside of work hours, and increasing entertainment options—and one of the ways consumers will ease the burden is by moving a number of functions into the home.

As the two- or even three-computer home will become standard in the 90s, working from the home will become much easier, home education may increase, and certainly home entertainment will be more sophisticated.

Although cooking at home might be an inconvenience, eating at home will fit right in. Take-out and delivery services will be in great demand. Those who continue to work in an office will demand with equal vigor the option of eating breakfast and lunch at work.

When consumers do choose to go out, notes Richard Good of R.T. Good & Associates, they will do so because they seek a specific environment or product that they cannot get at home. And, despite two-income families, rising housing costs will shrink the size of rooms in general and kitchens in particular, and we should see a new phenomenon: the restaurant-as-living-room. Entertainment, business and social activity will increasingly take place in restaurants.

We as a society will be several generations past the Depression Era mentality which dictated that extra money be put in the bank, not "frittered away" on such luxuries as restaurant meals. By the turn of the century, the view that experiences such as dining out actually make a hard-working, cosmopolitan lifestyle possible, not to mention more exciting, will be the norm.

The availability of information, coupled with an educational profile in which one out of four people will have a college degree by the year 2000 (compared with one in five today), implies adventurousness and curiousity as well as high expectations and a healthy dose of skepticism.

Shoddy experiences will not be tolerated, and quality—in food and service—will have to be a perpetual goal. Robert Nyman, chief executive officer of the George Lang Corp. in New York, notes, "Already consumers are being bombarded by 'the best.' They'll go anywhere they think 'the best' is. As the going-out public becomes more refined, they'll become even more driven."

The children of today's baby boom generation, exposed to global influences from birth and raised by parents with an unerring nose for quality, may be the ultimate connoisseurs. If a child snubs sweet and sour pork in favor of Peking duck at 12, what will excite him at 25? "The next generation will be even more demanding than this one," concludes the Lang Corp.'s Nyman.

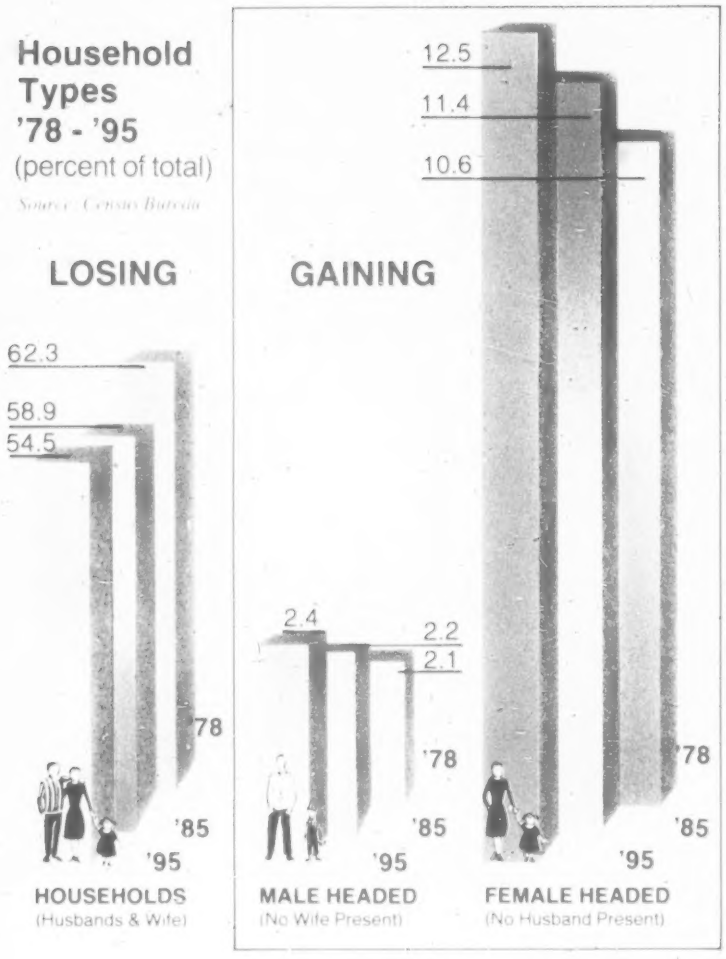
Other speculations about the youngest generation include increased job specialization, continued conservativism, and, perhaps, a return to closer families as people begin working at home more.

Westrends' Annison expects a strong sense of de-institutionalization among consumers in the year 2000. "We're seeing the ascending empowerment of individuals, exemplified by concepts like public referendums, do-it-yourself home building, and self-banking." Moreover, adds Annison, consumers are demanding options. "We've gone from a production to a consumer environment. The consumer will have more power than ever in 2000."

The economic outlook

The economy of the year 2000 will be undeniably global in nature, just as society as a whole will be cosmopolitan. Rapid exchange of information, technological advances, and a favorable regulatory climate should accelerate an existing trend. Much of the U.S.'s future economic reality will hinge upon the country's ability to compete on a worldwide scale; today 70 percent of goods produced are globally competitive.

The feeling about the American



economy in general is upbeat. "We're on a roll that's going to continue," says Randy Fields, president of Fields Financial Corp. Despite the fact that it is clearly difficult to predict with certainty the course that the economy may take—in the last 15 years the U.S. economy has endured three recessions, two energy crises, and the weakening of the international banking system—Fields feels that there is every reason to believe that the outlook through the 1990s is very positive. The population is aging, he notes, and the older people get the more conservative their values. "Politics will follow, and conservative politics make for low inflation." Coupled with his expectation that the dollar will remain strong overseas—in fact establishing itself as a reserve currency—Fields puts the inflation rate of the year 2000 at four percent per year.

On the other hand, the U.S. government is predicting real growth in the economy (based on growth in the labor force and in plant capitalization) of four percent annually through 1990, but according to Robert Ortner, chief economist for the Department of Commerce, that rate can be expected to slow somewhat thereafter as the rate of population growth slows and the economy finishes taking up slack in resources idled in the most recent recession.

Christopher Katon, director of long term studies and a vice president for Data Resources, Inc., also takes a somewhat more conservative view. He believes that although the long-term outlook for capitalization is favorable, the slowing in growth of the labor force will be critical. Based on projections of real growth of three percent per year through 1990 and about 2.5 percent thereafter, Katon posits that the rate of real income growth, and thus consumer spending, will eventually lag; real personal income growth is expected to slow to the annual average rate of about 2.3 percent throughout the 1990s, compared with a rate of nearly five percent from 1963 to 1973. In Katon's scenario, inflation is expected to stabilize at about six percent.

Still, Fields expects that the labor force issue will not be as critical as some economists predict, as conservative sentiment coupled with the growing realization that the native-born base is shrinking will open wider the doors to immigrant labor.

Corinne Denlinger of the Naisbitt Group, on the other hand, sees an era of more jobs than people to fill them, noting that in today's economy more than 600,000 new companies are created every year, with a failure rate no higher than in the 50s when about 90,000 were formed annually. In the years ahead, she says, this suggests that 3 to 4 million jobs will be created every year while the number of new workers declines. "It will be a market in which even entry level employees will have to be more highly paid, and companies will have to change the way they operate

in order to attract workers."

Michael Annison envisions a situation in which there is one great middle class, with the vast majority of the population making the turn of the century equivalent of $20,000 to $30,000 per year. Discretionary income, as a result, will go up. Away-from-home dining, for example, is already growing at a faster rate than at-home and should continue the pattern; according to Sandra Shaber of Chase Econometrics, away-from-home spending will grow at an annual rate of about 3.2 percent through 1993, versus at-home growth of only 2 to 2.5 percent.

Finally, George Rice has suggested that based on the supply and demand profile of the foodservice industry, in which the demand-driven seller's market of the 60s and 70s is a thing of the past, the industry as a whole is unlikely to ever again get "caught short" on demand as it was in the down years of 1979 through 1983. Fluctuations may occur in the economy, but the foodservice industry has learned not to overextend itself, and therefore its own ups and downs will be less dramatic.

The future of foodservice: A tough marketplace

Over and over we heard it from the experts we interviewed: To survive in the ultra-sophisticated 2000s, a restaurant will have to approach perfection—the food will be artistry, the service flawless, the environment consumately welcoming. "The non-essentials will become essential," warns Bob Nyman. "No more silly waiters, 3-day-long wine lists, pompous maitre d's."

To say that the foodservice business of the year 2000 will be a challenge is somewhat of an understatement. We see a tighter, market-driven environment ahead, characterized by an increasingly choosy customer base and an ever growing selection of restaurant options. Tightening land and labor resources will create additional pressures, as will spiraling marketing costs. "The industry will be very consolidated by the year 2000, making it much more competitive in the areas of marketing, product innovation, and service," suggests Charles Lynch, chief executive officer of Saga Corp. "The strong are going to get stronger."

An even more telling question: will the small survive at all?

Most observers agree that the early 21st century will favor big business. Chains—looking less like chains and more like neighborhood restaurants—will be well positioned for the 2000s. Their bigger budgets, greater professionalism and access to labor-saving technology will enable them to withstand high operating costs better than their independent competitors. As a result, more entrepreneurs will opt to franchise rather than to start their own businesses from scratch. "The reason is simple," says industry consultant Martin Cherneff. "Success is more likely with a proven concept."

The economics of business in the year 2000 will force franchisees into an increasingly sophisticated role. "Instead of opening a restaurant to 'buy a job,' the professional restaurateur of the future will be buying investment, annuity, and entree to big money," Cherneff suggests. As franchisees become big business, the mom 'n' pop licensee—already a vanishing breed—will get a shrinking portion of the pie. "Parent chains would rather deal with a few big franchisees than with many small franchisees," says Dick Good. "The efficiency factor is better this way."

Gone in the 2000s will be the solo franchise concepts of the 60s. The economies of scale will encourage franchisees to take on many concepts, and their parent companies will not object. Further, more franchisors will cross over to become franchisees. "The desired franchisee will be the professional wanting to expand," concludes Good.

If chains will be favored by next century's financial climate, what will become of the independents and small chains? This is a subject of passionate debate. "Marketing, training, real estate, and food quality will all demand more money and sophistication in the future. An independent may have a good concept but still find it hard to compete because of lesser resources," warns Dick Good.

"The young upstart companies you hear about today will never have made it," insists Don Smith, professor of HRI at Michigan State University. "The giants will jump into their niches and steal their thunder."

Yet, the current viability of small and mid-sized companies convinces others that there is still tremendous potential for the independent foodservice businesses. Indeed, Mark Levy, co-founder of the Levy organization in Chicago, believes it will be the independent restaurateur that has the advantage. "The independents have had to work hard to compete with the chains, but now they've learned from them. Their ability to marry quality, individual concepts with business savvy will create a lot of problems for chains."

Bill Fisher, executive vice president of the National Restaurant Association, concurs. "A well run, responsive independent operator will still be very much in evidence, because the restaurant industry is a lo-

cal industry," he says. Fisher also foresees a healthy future for small chains, if they carve their niche now.

Michael Annison of Westrend feels that society's general evolution towards individual control and away from institutionalization will cause growing numbers of restaurateurs to chose the independent route—regardless of business conditions. This would strike a note with American Culinary Federation executive director L. Edwin Brown, who believes: "People that work as many hours as is required in the restaurant industry want to work for themselves. They want to be the captains of their own destiny."

Changing markets

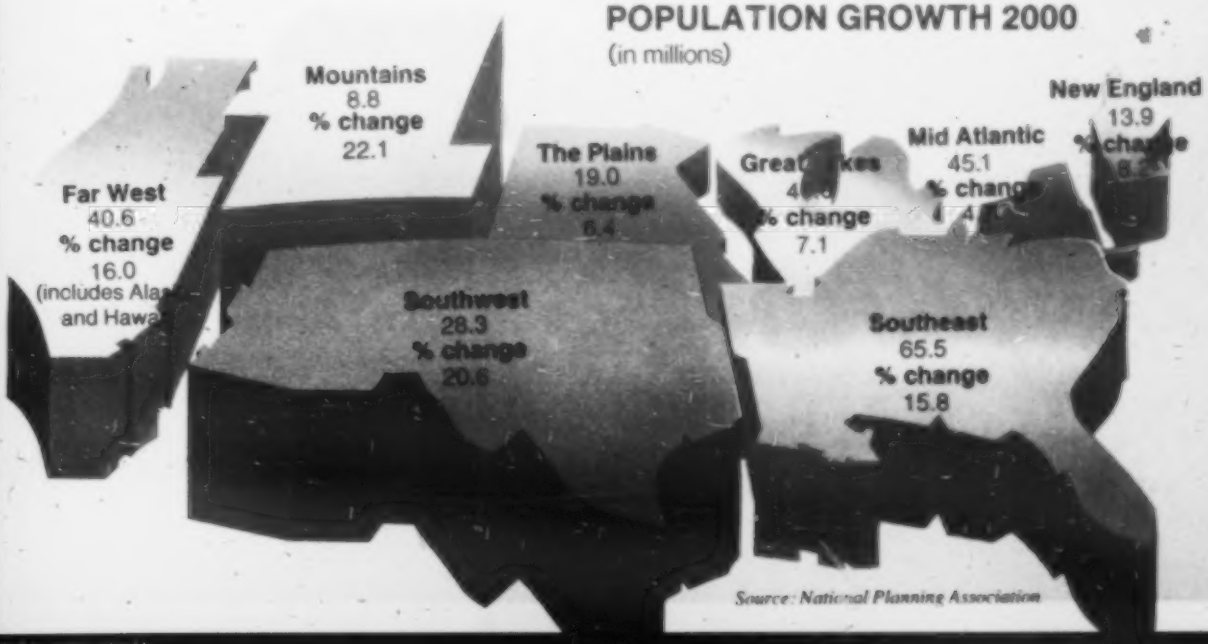
The changing nature of society and of consumers through the next two decades will impact the industry in many ways. In some markets, growth—and competition—will occur through crossing the boundaries into new forms of business. While independents, regional chains and industry titans battle among themselves for market share, they will also face strong new rivals in the grocery industry. Most industry observers believe that the competition from supermarkets and convenience stores is just beginning. Today's salad bars and homemade soups will give way to extensive take-out services and perhaps even on-premise eating. Convenience stores will replace their microwaves with grills. Even today, innovative grocery stores are marketing wine steward and catering services to customers. By the year 2000, this could lead to a situation where "grocery stores, convenience stores, and restaurants will be markedly indistinct," concludes the National Restaurant Association's Bill Fisher.

Yet, there is a dissenting voice regarding the encroachment of retail on foodservice. Ed Cornish of the World Future Society argues that supermarkets, at least, will not be competing with restaurants in 2000 for the simple reason that there may be no supermarkets. He foresees an arrangement by which people order their groceries via computer terminal. The computer might even be used as a small-scale inventorying system, automatically ordering oft-used staples. Payment would be directly from bank to purveyor, electronically, with no money changing hands.

Instead, various opportunities will exist in a number of specialized areas, particularly care of the aged and catering to the busy.

Caretaking

Health care and life care—already two of the fastest growing segments in noncommercial foodservice—will be booming. The country's growing "aging bubble" of people over 65 will significantly boost and change these segments. Dan Krpan, vice president, sales and marketing, for Canteen Corp, notes: "These people, in their 40s and 50s now, have a high level of expectation. They earn more and want more than their Depression-era predecessors. There is a tremendous demand to respond as this peak moves into old age." More freedom of choice in meal times, more menu variety and quality, better service, and more restaurant-oriented



amenities are all indicated.

Bill Edmunson, president of the the Health Care Nutrition Services Division of ARA, makes a point that as a group, acute care facilities are changing, and with them, opportunities for profitable foodservice. More work is being done on an outpatient basis, for instance, and in searching for profit niches, hospitals are specializing in elite medical areas such as cardiology and burn care. In the future, suggests Ferdinand Metz, president of the Culinary Institute of America, hospitals may also up their competitive value by dramatically improving their food. Hospitals are also trying to increase their viability by getting involved in nonpatient feeding: employee feeding, "meals on wheels," and providing meals to community centers.

Opportunities exist not only in traditional acute care hospitals and nursing homes, but in the growing area of "life care" or retirement facilities, where the level of medical supervision is minimal and residents are quite active. Alternative forms of care, such as convalescent homes (cheaper for the recovering patient than an acute care facility) and group living for the elderly, should also emerge as seniors seek to continue a high quality of life.

Take-out and delivery

The demand for convenience is one of the distinguishing characteristics of the baby boom generation; many experts think convenience will be even more of a necessity for their children. In the next 15 years, this demand is going to spark an explosion of take-out and delivery services that might alter the foodservice industry more than any other factor. The recent phenomena of gourmet take-out shops and supermarket foodservice are just precursors of this trend. "Soon, we will no longer be in the restaurant business" warns George Rice. "We'll be in the food delivery business."

The growth in number of working couples with children and the evolution of home as an entertainment center will be two of the the dynamics fueling the take-out boom. Parents seeking "quality time" with their children and others wanting to relax in their entertainment rooms will often want to eat—but not cook—at home. "Expense won't be an issue, as time will be more valuable to the consumer," notes Doug Higdon, vice president of training for Jerrico, Inc. "A lot of families will be able to afford this luxury."

It is possible that physical living conditions will reinforce the inclination not to cook. "Especially in larger cities where we'll have vertical lifestyles, living modules will be designed without kitchens," predicts Dr. Ronald F. Cichy, director of educational services for the Educational Institute of the American Hotel & Motel Association.

As more operators add or specialize in take-out and delivery, they will have to upgrade the quality of these services, adds Rice. "Consumers of delivered food will be very value-conscious," he says. "Food will be delivered at a specified time, with a more personalized approach."

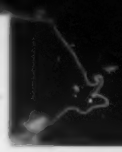
Technology will play a major role in upgrading delivered food, Rice speculates. "I envision a truck pulling up to an apartment building, loaded from the outside like an airline cart. Inside, foods are kept warm, cool, lukewarm, and hot. The driver might assemble the foods into another container, and bring them into the house. A computer system will tell him exactly what to do, and who gets what."

The growing take-out market will fuel [illegible] new business [illegible] tions, suggests Dick Good. [illegible] there is a new breed of [illegible] the delivery specialist who [illegible] promote and deliver the [illegible] a non-delivering restaurant. [illegible] also see an increasing [illegible] for mobile restaurants. "There will be traveling kiosks, that are [illegible] take a restaurant direct to the people." Good foresees large-scale [illegible] of mobile restaurants at [illegible] sports events, and [illegible] events like air fairs.

R. Wray [illegible], vice president of food service for [illegible] Marcus, feels that the potential for department and specialty stores to tap into this market is especially tremendous. "There is a role as [illegible] assistant that we can fill," says Jones. By locating prepared food "boutiques" conveniently to entrances, shoppers can stop in to pick out some or all of an entire meal, while a coordinator can suggest additional dishes, wines, table settings, and attend to other details.

Hotels will also get in on the rapid take-out action by adding retail outlets that sell baked goods, prepared foods and giftware, says Erik Erlandsen, manager of food and beverage development for Westin. Hotels will increasingly need added incentives to pull guests in and these types of products will be particularly appropriate "extras," he adds.

Mixed-use developments will help fill the convenience market, suggests Scott Ditch, of The Rouse Company. The Levy Organization's Mark Levy agrees, predicting that mixed-use, urban, and suburban developments will be the norm for the 21st century, combining commercial, retail, office, entertainment, and residential functions in one big plan.



FOOD

The workplace

Business feeding is another area that will experience big changes in the near future. Say goodbye to the deli dash and the lunchtime cafeteria blues: 2000's weekday lunch is going to taste better and be more convenient than it is now. Many of the changes in store will involve upgrades in the total work environment.

One of the dynamics that will most affect foodservice is the geographic dispersal of workers. Most experts see the demise of the giant plant, replaced by the Silicon Valley prototype of at most several hundred people. Therefore, foodservice must be exciting enough to satisfy a demanding customer, but scaled down as the workplace gets smaller. Consequently, many employers may turn to a single, shared foodservice concept in multi-tenant office/industrial park environments. These facilities, available to all employees, will be exceedingly market-driven.

Those employers who remain in urban centers will be upgrading their foodservice for a variety of reasons. Jack Galione, of Corporate Food Services Inc., argues that employers will become more aware of the link between environment and productivity. In an effort to maintain high morale, he says, employers will provide corporate dining that closely mirrors the freestanding competition.

Bill Fisher suggests that office developers will start to sweeten their offerings by including foodservice facilities and health clubs in their original design. "Workdays will be broken up so employees will have flex time commensurate with their personal considerations. The 'lunch hour' will instead be a 90-minute 'meal break' during which people will likely spend 45 minutes eating in a convivial facility—potentially on-premise—and spend another 45 minutes exercising."

Dr. Joseph F. Durocher, associate professor at New York University's Center for the Study of Foodservice Management, believes that the lunch hour will be extended even further. "They'll stretch the lunch break to two hours so employees will have their own time to eat lunch and do errands," he says. "Workers will compensate by arriving at 8 and leave at 6."

Foodservice opportunities will not be limited to lunch, adds George Rice. "People are going to want that convenience, and this doesn't just mean lunch. There's no reason why people won't eat breakfast at work." Rice also sees a very profitable situation for operators who will provide snacks in the office and supply take-out dinners.

Restaurant outlook

There is much talk about segment blurring. As restaurants strive to meet tomorrow's higher standards, fend off the convenience store market, and lure people out of their homes, how will segments change? Two directions in market positioning in the year 2000 seem likely. There will be more and more diverse but specialized market niches: quick service family, sit-down family, ethnic, specialty, brasserie, urban fast food, take-out only; the list is perhaps endless. Yet, there will also be a great deal of segment crossover as certain types of restaurants attempt to appeal to the broadest possible base of consumers. Though seemingly contradictory, both directions are indicative of a single scramble to establish market share in a highly competitive environment.

A competitive squeeze and the demand for quality restaurants will create greater specialization, predicts Bob Nyman. "Fast food will

The American bread basket is expanding. Our ability to farm food—and fabricate it, reconstitute it, granularize it, reversibly dehydrate it, and irradiate it, among other things—is growing by leaps and bounds. Some advances, especially farming techniques that will boost the quality and quantity of fresh foods available to restaurants, will clearly affect foodservice. Others, however, are more likely to impact international food supplies or military feeding without ever touching the restaurateur's table.

Hydroponics, fish farming, and bioengineering are some of the agricultural technologies that may dramatically affect future food supplies. Hydroponics, a greenhouse farming technique that substitutes liquid nutrients for soil, allows produce to be grown closer to the places it will be consumed. Because hydroponics takes place in a controlled environment, seasonality is thwarted. Moreover, crops grown hydroponically grow twice as quickly as their field grown counterparts. Thus, hydroponics offer the potential of fresher produce, available year-round and at lower costs.

Although the high costs of maintaining a controlled environment hindered early experiments, hydroponic farmers have now economized by switching from artificial to natural light. Thus, says Bryan Silbermann of the Produce Marketing Association, more and more crops are being hydroponically farmed. Among crops now grown through hydroponic methods are Boston lettuce, tomatoes, and cucumbers.

Hydroponics, as demonstrated at EPCOT center, can produce crops at lower costs despite the energy

Aquaculture, or sea ranching, allows farmers to grow certain species of fish—plus other products like kelp or seaweed—in controlled ponds and tanks. By regulating both environment and feed, farmers can speed up production of fish year-round. Sea ranching also promises a much fresher supply than the traditional fishing boat, which often holds "fresh" fish for as long as two weeks before docking. Catfish, salmon and shrimp are now being successfully farmed by sea ranchers.

Biotechnology and the hybridization of crops is old news. But new experiments in DNA transfer give biotechnology a definite sci-fi air. Scientists are currently experimenting with cloning techniques, by which the nucleus of an egg is removed and replaced with the nucleus of a body cell. This results in an exact duplicate of the organism the body cell was taken from. Egg fusion is a technique that would enable scientists to fuse two eggs together and thus eliminate the need for male genetic material. Scientist have also succeeded in fusing two or more very young embryos to produce an animal of mixed species (called a chimera). Thus far, chimeric creations have been confined to mixed-species mice.

In terms of agriculture, John F. White, vice president and director of research and development for a major food manufacturer suggests that biotechnology will have its biggest impact in cost and quality control of existing varieties of produce. Biotechnology, he speculates, will allow scientists to tailor produce in terms of increased durability, taste, and cost. Researchers are already working on such practical modifications as flat or square-sided corn that won't roll on plates and square melons that will ship with less bruising. Work is also underway on celery, citrus, coffee, popcorn, soybeans, tobacco, wheat, and carrots.

Technology is also producing new food substances. "Fabricated" or "engineered" foods are both phrases that have been getting a lot of attention lately. Engineered foods are used in two ways, as analogs that substitute for specific foods (as a nondairy creamer does for milk) and as ingredients that extend or emulsify foods (as a meat extender would do). New biotechnology techniques are quickly offering new alternatives to meat and dairy products that researchers believe will ultimately be accepted by the public.

One of the most promising breakthroughs in the realm of food engineering was the development of isolated soy protein. Isolated soy protein—which is quite different from the textured soy used to make soyburgers—is a 90 percent protein substance that can be used both to extend meats and as a total analog to seafood, frozen desserts, diet bever-

ages, and infant formula. Researchers see vast potential for isolated soy protein because it has no soy flavor and binds well with other substances. Babies who are allergic to milk (13 percent of all babies) already consume isolated soy protein in their infant formula, and test marketing of selected products to health-conscious adults has proven successful.

Reversible compressed foods constitute a curious innovation that was first developed by the Navy for submarine use. Through this technology, fruits and vegetables such as carrots, green beans, corn and berries are freeze-dried and then compressed to 3/4-in. thick disks. When the foods are later put into water, they pop back to their normal size and shape. Despite the body-busting treatment, reversible dehydrated foods reportedly have the quality of fresh frozen goods.

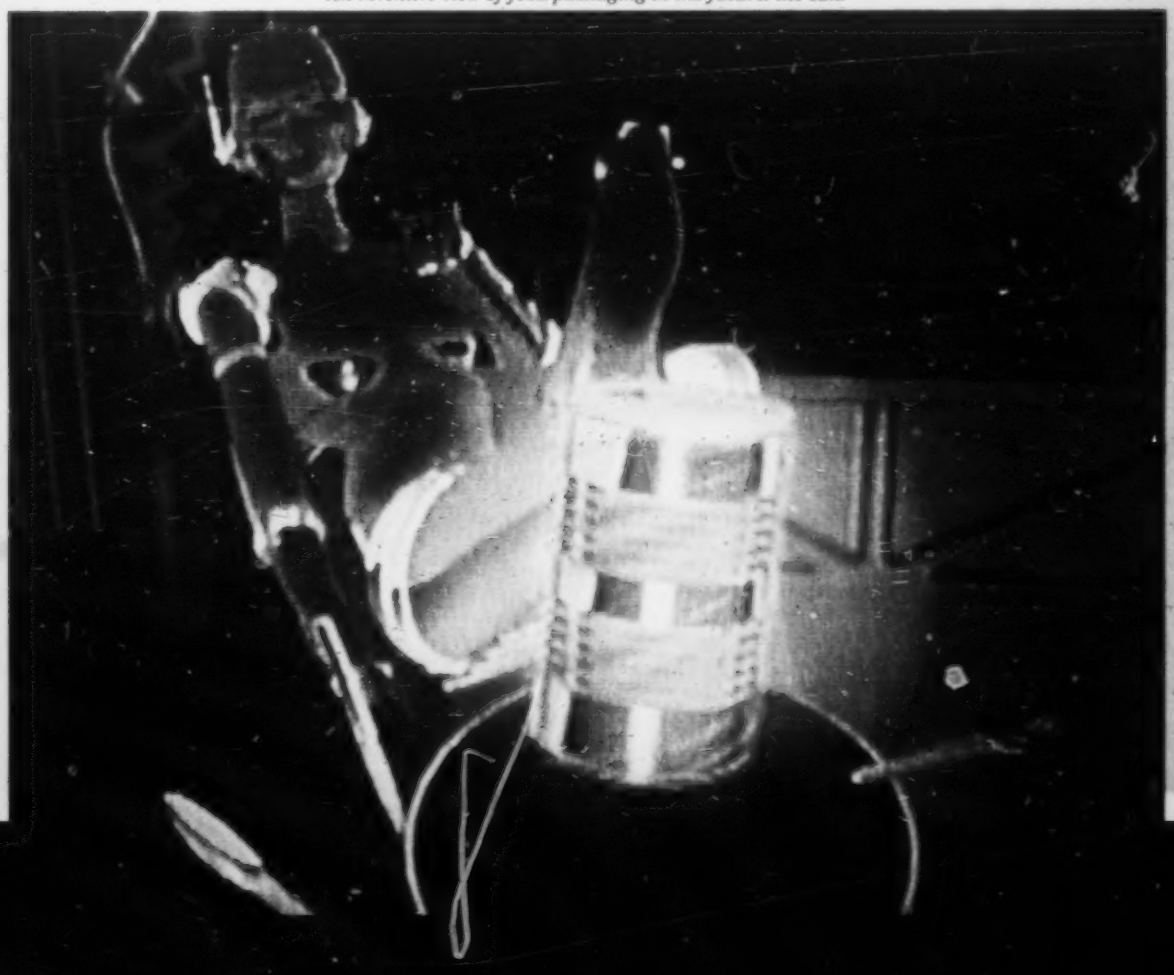
Of more application to foodservice is a dehydration process by which fruits such as berries are granularized and dehydrated. The granules, which are more intensely flavorful than fresh fruits, are then used in baked goods and desserts. Improvements have also been made in traditional freeze-drying. In a new procedure, produce can be dried three-quarters of the way, then frozen. Because most moisture loss occurs in the last quarter of drying, partial drying makes for better textured foods.

New technologies are also affecting food processing. One of the most controversial but potentially useful is irradiation. By exposing foods to an ionizing radiation source, foods can be pasteurized or sterilized, depending on the dosage. (The energy is used up in the process and the foods are not radioactive themselves.) Irradiated foods are ready to eat and can be stored at room temperature for years. Moreover, because they are not exposed to high temperatures, their quality is better than that of thermally processed foods.

Researchers claim, in fact, that irradiated products closely resemble foods made from fresh items. To date, the FDA has approved irradiation treatment only for potatoes, spices, and wheat. Although many are lobbying for further extension of approval, a full go-ahead has been granted only to NASA. NASA, in turn, has made irradiated foods standard fare for the explorers of the future—the astronauts.

—Alexa Bell

An inventive view of food packaging in the future: the can.



Top 30 Markets in 1996

*MSA '96 rank	1/1/96	1/1/86	'86 Rank	%Change
Los Angeles-Long Beach 1				
population	8,573,600	7,855,400	2	9.1
households	3,146,600	2,877,400		
total e.b.i. **	$225,756,921	$100,317,996		
total retail sales	$112,043,786	$49,486,789		
New York City 2				
population	8,340,100	8,274,900	1	0.8
households	3,418,900	3,274,400		
total e.b.i.	$214,802,770	$103,230,531		
total retail sales	$82,252,061	$38,846,348		
Chicago 3				
population	5,894,500	6,007,200	3	(1.9)
households	2,333,800	2,232,200		
total e.b.i.	$149,551,044	$79,740,211		
total retail sales	$65,476,572	$36,371,367		
Philadelphia 4				
population	4,801,800	4,737,500	4	1.4
households	1,855,800	1,721,900		
total e.b.i.	$148,640,836	$59,702,832		
total retail sales	$64,977,373	$26,641,706		
Houston 5				
population	4,611,500	3,379,100	8	36.5
households	1,772,000	1,237,800		
total e.b.i.	$125,545,411	$45,992,881		
total retail sales	$71,362,193	$25,462,839		
Detroit 6				
population	4,134,200	4,329,000	5	(3.1)
households	1,606,300	1,563,700		
total e.b.i.	$118,242,432	$53,575,006		
total retail sales	$57,636,515	$26,211,404		
Washington, D.C. 7				
population	3,764,900	3,427,000	7	9.9
households	1,442,700	1,268,800		
total e.b.i.	$148,937,821	$55,391,377		
total retail sales	$65,938,769	$25,309,863		
Boston-Lawrence-Salem-Lowell-Brockton 8				
population	3,667,200	3,659,800	6	0.8
households	1,453,700	1,355,500		
total e.b.i.	$121,173,045	$49,410,491		
total retail sales	$64,033,577	$26,682,214		
Dallas 9				
population	2,916,600	2,300,500	12	26.8
households	1,155,700	865,700		
total e.b.i.	$85,766,914	$31,176,891		
total retail sales	$48,431,323	$17,854,601		
Anaheim 10				
population	2,914,500	2,416,400	10	20.6
households	1,123,000	883,800		
total e.b.i.	$87,586,220	$30,380,215		
total retail sales	$42,474,046	$15,268,893		

come in tight, simple boxes. A bistro will be just a bistro. Gourmet burger restaurants will become luncheonettes. Customers won't accept something that doesn't meet their expectations."

"Operators will begin to create more of their own niches," says W.R. Grace's Louis Neeb. "Just as traditional retail has boutiqued around the big department store chains, independent restaurants will boutique around foodservice chains."

On the other hand, many observers believe that the scramble for market share will have a blurring effect. "Everyone is trying to upgrade to compete against the people under them who are upgrading," notes Dr. Tom Powers, director of the School of Hotel & Food Administration at Canada's University of Guelph. "Convenience stores are nipping at the heels of fast food. Fast food is responding by upscaling decor, and the trend continues into other segments."

Bill Fisher theorizes that for many restaurants both menu and decor will be versatile. "If a restaurant is 5,000 sq. ft., for example, there may be four different areas, such as Mexican, Italian, seafood, and Western," he says. The reason restaurants will be so versatile, explains Fisher, is that they will have an unusually strong repeat customer base by today's standards. "As hotels used to be social centers for towns, or saloons in the Old West, restaurants will be the social center in 2000."

According to Martin Cherneff, all restaurants, whether marketing convenience or a dining experience, will feel more pressure to create a total image.

Menu format, atmosphere and design, uniforms, service style, and table appointments will make equally strong statements about the image, no matter what the segment.

Fast food

John Stanton, the C.J. McNutt chair of food marketing research, St. Joseph's University, sees a broadly different role for fast food in 2000. "There's a paradox in what will happen," explains Stanton. "People will have more money to spend but less time in which to spend it. Lots of segments will provide a quality experience in a limited time frame. Fast food will change to keep its share."

Many experts see fast food as the one segment that will make extensive use of front-of-the-house technology to enhance convenience. "Fast food will still be serving people who want instant gratification, as time will be precious in 2000." says Doug Higdon of Jerrico. "To meet their temporal needs, fast food service will be computerized, as simple banking functions are today. The customer will perhaps key his order into a computer board or touch a few buttons, and he'll receive his meal almost right away." Or, a fast food menu might be on the table much like a jukebox is in a diner today, suggests Joe Durocher of New York University. The customer can send his order to the kitchen directly from the table.

Fast food, like the industry as a whole, appears directed in two diverging paths. Many restaurants will upscale, merging with or replacing the family restaurant segment. Others, however, will capitalize on the increased demand for delivery; these restaurants will substantially downscale their facilities.

For delivery, Dick Good foresees "embryonic operations with gourmet dinners that you pick up or have delivered for $7 to $10." In-store dining will be eliminated; visible, (and high rent) locations will be less important than an easily remembered phone number. "Success will be based on speed of delivery and convenience as much as on quality."

Operators who opt against deliv-

*MSA '96 rank	1/1/96	1/1/90	'96 rank	% change
11				
population	2,396,800	2,704,300	6	7.1
households	1,000,000	874,700		
total e.b.i.	$124,178,389	$43,538,990		
total retail sales	$50,807,458	$16,724,895		
12				
population	2,805,800	2,238,200	15	25.3
households	1,115,300	831,700		
total e.b.i.	$106,004,930	$35,495,867		
total retail sales	$51,563,726	$17,525,420		
13				
population	2,646,400	2,133,300	17	24.1
households	1,038,400	793,800		
total e.b.i.	$80,519,501	$28,269,666		
total retail sales	$38,135,111	$13,511,566		
14				
population	2,493,000	2,245,600	14	11.0
households	978,300	805,700		
total e.b.i.	$90,704,081	$31,736,858		
total retail sales	$44,768,896	$16,341,936		
15				
population	2,475,700	2,392,400	11	3.5
households	962,500	883,100		
total e.b.i	$73,832,169	$29,489,149		
total retail sales	$36,527,116	$15,014,517		
16				
population	2,424,900	1,857,500	21	30.5
households	909,900	671,800		
total e.b.i	$51,529,779	$20,500,551		
total retail sales	$27,422,778	$10,551,666		
17				
population	2,424,200	2,278,500	13	6.4
households	917,900	818,500		
total e.b.i.	$30,485,263	$12,887,159		
total retail sales				
18				
population	2,337,800	1,880,600	19	24.3
households	980,200	774,000		
total e.b.i	$65,072,377	$22,436,516		
total retail sales	$34,010,471	$11,991,928		
19				
population	2,288,300	1,776,800	24	28.8
households	944,700	685,500		
total e.b.i.	$63,986,348	$21,406,886		
total retail sales	$30,303,036	$10,137,268		
20				
Population	2,230,600	1,841,700	22	21.1
households	799,500	671,900		
total e.b.i.	$55,203,521	$21,317,921		
total retail sales	$30,798,090	$11,994,177		

table continues on page 222

*MSA '96 rank	1/1/96	1/1/86	'86 Rank	% Change
[illegible] 21				
population	2,112,800	1,890,600	18	11.8
households	884,300	743,200		
total e.b.i.	$71,495,817	$27,946,068		
total retail sales	$30,365,256	$12,056,143		
[illegible] 22				
population	2,106,400	1,663,600	26	26.6
households	881,000	658,600		
total e.b.i.	$70,802,072	$24,029,170		
total retail sales	$33,223,252	$11,376,684		
[illegible] 23				
population	2,090,000	2,162,800	16	(3.4)
households	860,100	835,700		
total e.b.i.	$58,143,282	$26,358,717		
total retail sales	$26,673,415	$12,176,118		
[illegible] 24				
population	1,936,000	1,714,500	25	12.9
households	804,600	679,400		
total e.b.i.	$73,757,502	$25,686,320		
total retail sales	$35,706,652	$12,893,870		
[illegible] 25				
population	1,844,800	1,865,300	20	(1.1)
households	694,900	666,100		
total e.b.i.	$66,675,436	$27,124,634		
total retail sales	$27,228,603	$11,431,397		
[illegible] 26				
population	1,722,000	1,444,200	29	19.2
households	683,900	535,600		
total e.b.i.	$66,774,204	$23,176,683		
total retail sales	$33,286,773	$11,762,581		
[illegible] 27				
population	1,719,500	1,823,300	23	(5.7)
households	703,300	704,000		
total e.b.i.	$49,185,355	$22,446,708		
total retail sales	$24,201,457	$11,143,459		
[illegible] 28				
population	1,587,100	1,371,600	30	15.7
households	624,800	508,400		
total e.b.i.	$40,548,210	$15,538,130		
total retail sales	$19,439,594	$ 7,633,471		
[illegible] 29				
population	1,575,300	1,518,500	27	3.7
households	690,600	640,800		
total e.b.i.	$61,852,515	$25,522,011		
total retail sales	$30,715,750	$12,886,273		
[illegible] 30				
population	1,559,500	1,469,400	28	6.1
households	629,900	562,700		
total e.b.i.	$45,373,145	$18,937,826		
total retail sales	$24,850,273	$10,336,658		

Metropolitan Statistical Area, the basic unit of metropolitan area definition
**Effective Buying Income, for the total market*

ery may have to upscale more, offering healthier/lighter options; more menu diversity; and a more comfortable, social atmosphere in order to maintain identity. This group, says St. Joseph's Stanton, will position itself between "experience dining" and home dining. The price point will go up, he adds, but in general the segment will still be relatively low-cost.

Don Smith suggests that modified table service, a comfortable dining room, and more interaction between customer and worker will benefit both: "When things get busy now you see the manager cooking. In the year 2000, he'll be talking to the customers and he can observe them. Observation is the best market research in the world."

Mid-priced

Pressure from upscaling fast food, says John Stanton, will be felt most in the coffee shop and family restaurant category. As fast food moves up, mid-priced restaurants too will be upgrading, offering better, fresher food and more convivial environments. These two groups might begin to merge, producing what Don Smith calls "family replacement meals"—the meals that other generations would have shared with their families at home. In addition, some mid-priced restaurants may protect themselves from encroachment by appealing to the the huge graying population and concentrating on a warm, service-oriented atmosphere.

Jeff Miller, president of D'Lites, believes that "consumers haven't had enough facilities that give a sense of atmosphere in a quick service environment." In the future, he adds, coffee shops and fast food concepts like D'Lites will have more in common. "Coffee shops will go towards nutrition, and fast food will move to breakfast bars and salad bars."

Today's gourmet hamburger con-

The market leader.

SAUSAGE GRAVY | CREAM GRAVY | CLAM CHOWDER | CHOCOLATE PUDDING

GUARANTEED QUALITY™

Only Pioneer products carry this quality seal.

Pioneer Old Fashioned Biscuit Gravy Mix.

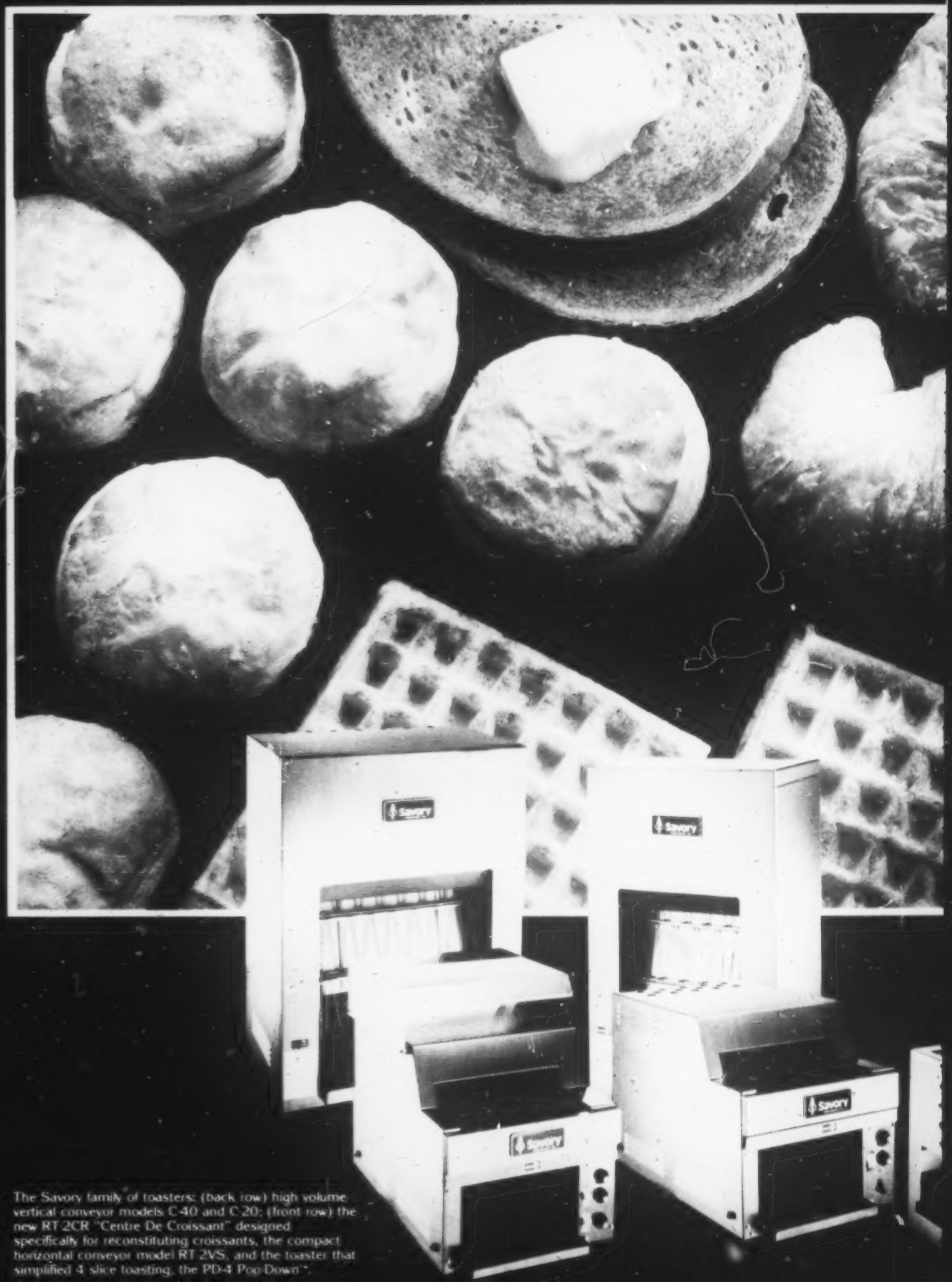
When you purchase Pioneer Old Fashioned Biscuit Gravy Mix, you've bought more than an easy-to-prepare gravy mix for biscuits, chicken-fried steaks and potatoes. Its exceptional versatility makes it an excellent base for soups, vegetables, and a variety of delicious desserts, too. So, you can easily use it to prepare side dishes for breakfast, lunch or dinner! It's made exclusively for the food service industry and, like many other fine products from Pioneer, it's the unquestioned market leader. Try it yourself and see why! Ask your distributor for Pioneer Old Fashioned Biscuit Gravy Mix today!

PIONEER®

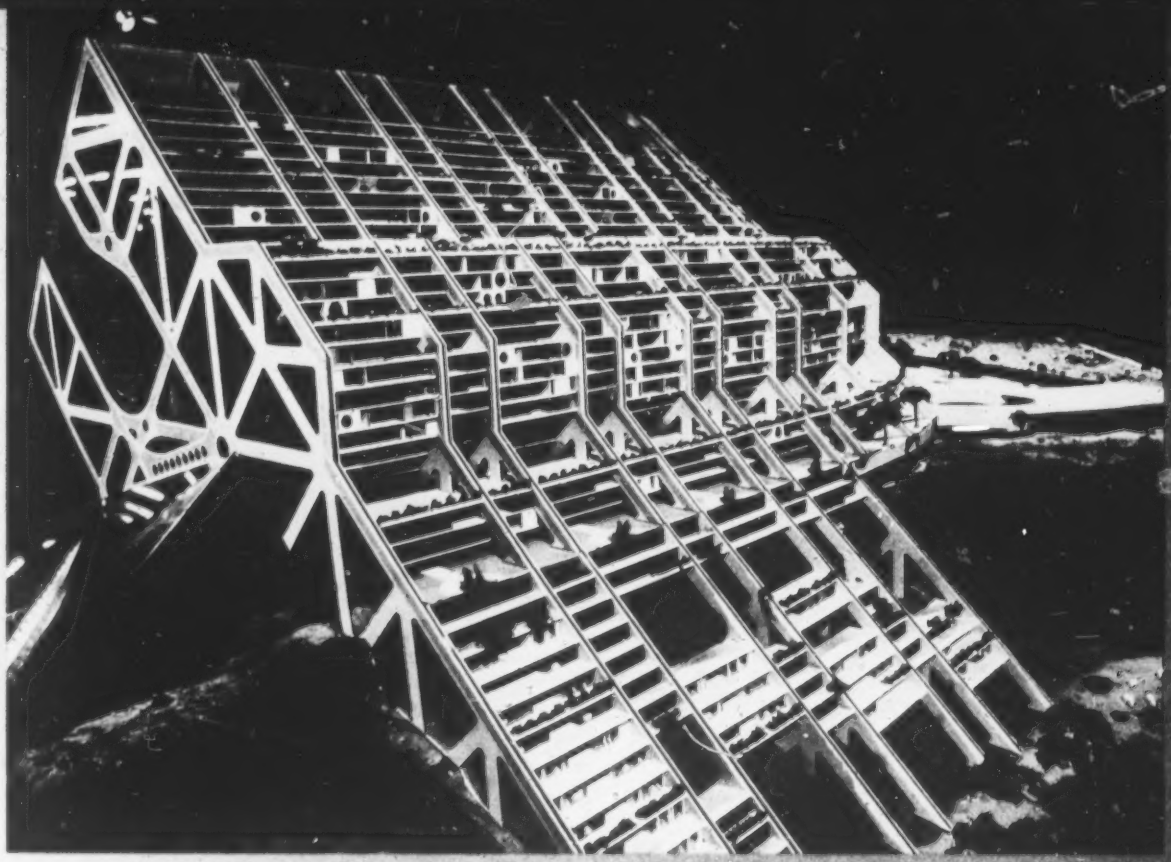
©Pioneer Flour Mills

P.O. Box 118 San Antonio, Texas 78291 (512) 227-1401

For information, circle number 104



The Savory family of toasters: (back row) high volume vertical conveyor models C-40 and C-20; (front row) the new RT-2CR "Centre De Croissant" designed specifically for reconstituting croissants, the compact horizontal conveyor model RT-2VS, and the toaster that simplified 4 slice toasting, the PD-4 Pop-Down™.



Arcosanti, an experimental city designed by Paolo Soleri, symbolizes personalized design of the future.

Some, including Voorsanger, might take issue with that. Likening restaurants to theatre, Voorsanger believes that in urban areas especially, there will be certain restaurants so poised on the cutting edge that their lifetime will be limited like a Broadway show. The super hot restaurants will be so immensely successful that they can recoup the owners' investment in 12 to 18 months, just as they "go out of fashion." Voorsanger also sees a place in the market for restaurants with "signature designers," which trendy consumers will follow with all the avidity of the best dressed.

David Jungel, however, feels that the truly successful restaurant will be the one conceived as "generic" in style—one which is flexible in the extreme to accommodate for the most shifts in public taste and overall restaurant concept. Anything else, anything too obviously themed, has the capacity to go out of fashion quickly and surely. Still, it is a mistake to view any design—no matter how thematically neutral—as changeless, says Jungel. "Be prepared to change the design or the total concept every 10 or so years to keep it fresh," he advises. "Very few concepts can last unchanged for any great length of time."

Barbara Schirmeister believes that success will be determined to a large degree by a restaurant's ability to offer a variety of environmental experiences and options, whether by using different lighting levels, colors, textures or materials, or by rotating any of these elements frequently—perhaps even daily. "Restaurateurs might even be able to offer an 'atmosphere de jour,'" she says.

As far as important design trends

Despite the fact that by the year 2000, designers will have myriad high tech materials and techniques at hand, consumers—surrounded by microchips and the state of the art at home and at work—are going to want—just the opposite: comfortable, warm, high touch surroundings.

in the year 2000, the views are many. Charles Mount sees an important Oriental influence, believing that the simplicity of Oriental—particularly Japanese—aesthetics lends itself well to a serenity which is pleasing as a backdrop for dining.

Almost at the reverse end of the spectrum, Ed Bronstein sees the occasional use of technology as an aesthetic unto itself; for instance, the use of a computer screen in lieu of a menu blackboard, or to flash messages such as "Welcome" to arriving diners. Bronstein is quick to point out, however, that such an aesthetic will never take the place of restrained, elegant design.

Addressing the issue of elegance, Spiros Zakas sees a return to classic, natural materials such as wood, marble, brick, wool, and cotton, instead of formica, plastics, and synthetics. Mount makes similar forecasts, noting that while such materials might be more expensive at the outset, they are cheaper in the long run to maintain.

Barbara Schirmeister envisions materials that "we can't even imagine today" making a number of design statements possible, such as mirror-like substances which reflect light in gradations, and subtle yet opulent paint patinas. A variety of textures might also be used to provide interest. Schirmeister also believes that metals derived or discovered through space travel will be available.

The exhibition kitchen so popular in the 80s may be with us for a while, say many designers. Born of a healthy interest in the process of cooking, exhibition kitchens also tend to create just the kind of excitement and drama many have in mind when they speak of restaurants as being very theatrical in nature.

And along the lines of entertainment, a number of things can be expected to develop. Accepting the idea of the restaurant—especially in the tablecloth segment—as an evening's entertainment, opens up a realm of concepts such as supper clubs, dinner theatres, dance clubs, and live entertainment.

Most designers also see a need for restaurants to be designed more like people's homes, as customers move out of their own abodes to do their entertaining. Catering to the small, elegant dinner party group of 10 to 12 could be an important market, providing an intimate yet not remote atmosphere. "It can't just be a room upstairs somewhere," explains Schirmeister.

Bart Voorsanger further explains that as people's homes become more cramped, public spaces will be designed to accommodate needs for privacy. "Many restaurants will be able to carve a niche for themselves by being intimate and providing a number of quiet, private spaces."

On the other hand, Spiros Zakas feels that in a very real way lighting and noise levels are going up. Comparing the restaurant of 2000 to the European street cafe, where seeing and being seen is as important as dining, Zakas says that "people want to feel that they are surrounded by activity and other people, that they are where the action is."

How do you reconcile this need with that mentioned by Voorsanger for privacy, especially as rising costs push tables closer and closer together? Voorsanger suggests personal headsets that allow for intimate conversation with table companions, or even noise shields that reduce neighboring sounds.—**Joan Lang**

gers. He also envisions a line of low-cost, high-quality seafood products prepared by surimi processing, which involves grinding inexpensive fish such as pollock into small particles and then reforming it with suitable flavor additions and binders to simulate shrimp, crab, or lobster.

Others, like Steve Poses, are skeptical about the suitability of serving fabricated food in restaurants: "It's antithetical to what people go to restaurants for."

Less controversial is a predicted use of more fresh foods in all levels of dining. Greenhouse farming, including relatively new hydroponic methods (which allow plants to grow in water), will allow growers to harvest crops previously unsuited to local conditions or seasons. New fish farming techniques, already used to grow catfish, salmon and trout, will vastly increase the quantity of fresh fish in the marketplace. As a result, restaurateur Bob Power can foresee a day when large fish chains like Long John Silver grow their own fish, process it daily and ship fresh-frozen fish to it as overnight.

Increased quantities of fresh local foods will be complemented by a worldwide network of food distribution. "Transportation is getting so advanced that food from all over the world will be common by the year 2000," states Andrew Udelson, one of three owners of Flying Foods International, a New York specialty food distributor. The economies of transportation will continue to improve, says his partner Paul Mortates, as countries—including Africa and South America—get behind their products and encourage farmers to export.

The global tastes that are evolving now will be mature by the turn of the century. The impact of Asia will be heavily felt, says Arnold Calabrese, who calls the 21st century the "Asian century." Noting that Asia has already squeezed out Europe as the country's largest trade partner, he predicts that the high-growth world market will be in Southeast Asia and the next big push on products coming into the country will be Asian. Two food trends he sees resulting from this trade are fast food sushi bars and cafeteria-style stir fry concepts in which consumers choose raw fish and vegetables which are stir fried in front of them.

Globalism will also result in increased familiarity with foods and cuisines from all parts of the world. Bob Nyman believes the result will be an international cuisine that will reflect all the foods and culinary traditions available worldwide. Westin's Erlandsen refers to this type of cooking as Cosmopolitan Cuisine. "The ethnic lines are becoming increasingly blurred," he adds.

Pure ethnic cuisines, however, will continue to thrive anyway, and many foods that sustain the large ethnic groups now entering the U.S. will have permeated the rest of the population. Judi Greening of Frieda's Finest Produce Specialties in Los Angeles foresees the popular use of such Mexican foods as cactus leaves (the pads of the nopalis cactus), prickly pears (the nopalis' fruit), tomatillos (Mexican ground tomatoes), and tamarindos (pod from a tamarindo tree). Among the Asian foods she believes will have broad acceptance in the next century are lemon grass and wild mushrooms such as the enoki and shiitake. And, many observers note that consumers will have increasing acceptance of such currently underutilized fish (now called trash fish) as crayfish, dogfish, and shark, which poorer cultures have always known and relished.

As food directions expand, the fate of alcohol is less certain. Increased health concerns, drinking-

LABOR

The foodservice industry will be facing the same changes in the workforce as the rest of the country's employers in the year 2000: a smaller percentage of teenagers; more workers over today's retirement age; and more nonwhite workers, many of whom will be Asian and Hispanic. Women will most likely continue to compose an increasingly larger portion of the workforce as well.

Although there will be a smaller percentage of teenagers in 2000, the population is growing so there will still be plenty of energetic young adults looking to foodservice for their first job. There will be fewer men and women aged 15 to 24—an age category important to the foodservice industry because people this age often work in foodservice while finishing their educations. There will most likely be 10.6 million men in that age category in 1995 (the latest year for which the Bureau of Labor Statistics (BLS) has projections), down from 13 million in 1982. Women in that age group will also number 10.6 million in 10 years, down slightly from 11.5 million in 1982. The BLS estimates that over 70 percent of men and women aged 16 to 24 will participate in the workforce in 1995, which is a substantial proportion although older age groups have larger participation rates.

The smaller amount of workers aged 15 to 24 will have open to them over 2 million more jobs in the foodservice industry in 1995, for a total of 8.2 million jobs, the BLS projects. That figure is 33 percent higher than the 1982 situation. Approximately three-quarters of those jobs—or 5.4

million—will be in separate eating and drinking places as opposed to other foodservice operations.

Of the 40 occupations with the largest job growth between 1982 and 1995, five are in the foodservice field: waiters and waitresses, expected to increase 34 percent, or 2.2 percent of total job growth; kitchen helpers, up 36 percent, or 1.2 percent of total job growth; food preparation and service workers in fast

EMPLOYMENT IN EATING AND DRINKING PLACES*

	1982		1995	
	NUMBER (in thousands)	PERCENT	NUMBER (in thousands)	PERCENT
TOTAL	4,781.4	100.00	6,551.5	100.00
Professional, technical, and related workers	**29.8**	**.62**	40.8	.62
Musicians	18.4	.38	25.2	.38
Managers, officials, and proprietors	**328.7**	**6.88**	480.3	7.33
Restaurant, cafe, and bar managers	311.2	6.51	456.3	6.96
Sales workers	**54.0**	**1.13**	68.1	1.04
Sales clerks	52.9	1.11	66.7	1.02
Clerical workers	**223.7**	**4.68**	314.3	4.80
Accounting clerks	2.3	.05	2.6	.04
Bookkeepers, hand	56.8	1.19	67.0	1.02
Cashiers	150.3	3.14	225.2	3.44
General clerks, office	4.0	.08	5.4	.08
Typists	2.8	.06	3.8	.06
Stock clerks, storeroom and warehouse	1.6	.03	2.3	.03
[illegible]	4.5	.09	6.1	.09
[illegible]	1.9	.04	2.6	.04
[illegible]	22.2	.46	30.4	.46
[illegible]	16.8	.35	23.1	.35
[illegible]	1.4	.03	1.9	.03
[illegible]	4,112.9	86.02	5,603.8	85.54
[illegible]	107.1	2.24	126.7	1.93
[illegible]	3,944.9	82.51	5,391.6	82.30
[illegible]	22.0	.46	30.2	.46
[illegible]	240.2	5.02	333.1	5.08
[illegible]	259.9	5.44	379.5	5.79
[illegible]	369.2	7.72	490.1	7.48
[illegible]	783.0	16.37	1,074.5	16.40
[illegible]	92.9	1.94	127.2	1.94
[illegible]	391.7	8.19	566.7	8.65
[illegible]	51.8	1.08	71.0	1.08
[illegible]	1,319.7	27.60	1,757.0	26.82
[illegible]	192.6	4.03	240.9	3.68
[illegible]	220.2	4.61	319.0	4.87
[illegible]	37.6	.79	51.5	.79
[illegible]	5.5	.12	7.8	.12

food restaurants, up 37 percent, or 1.2 percent of total job growth; restaurant cooks, up 42 percent, or 0.6 percent of total job growth; and cooks in short order, specialty, and fast food restaurants, up 32 percent or 0.6 percent of total job growth.

In fact, prospects look good for all foodservice positions except butchers and meat cutters. Only 179,000 jobs are expected to be open to them in 1995, which is six percent less than the 191,000 jobs in 1982.

With all these jobs and fewer young workers, who else will compose the foodservice workforce? There will be 19 million blacks and other minorities over age 16, which is 5 million more than there were in 1982. And more of the minorities are expected to participate in the workforce in 10 years: 66 percent as opposed to 62 percent in 1982.

Overall, many more women will join the workforce, a promising trend for foodservice, as women presently compose a large percentage of foodservice employees. In fact, women will be responsible for two-thirds of the labor force's growth, according to the BLS. In 1982, there were 47.8 million women in the labor force, a 53 percent participation rate. In 1995, there are expected to be 61 million working women, a 60 percent rate.

Because of the affluence of the baby boom generation, now in its prime wage-earning years, many will retire early. However, since foodservice lends itself more than most fields to part-time employment, we may receive a pool of people over age 55 who are anxious to work. There will be 8 million men and 6 million women over age 55 in the workforce in 1995, figures close to those of 1982. The difference is, in 1982, 44 percent of men and 23 percent of women were participating in the labor force, as opposed to a projected 35 percent and 20 percent respectively in 1995.

Although separate eating and drinking places will be responsible for the majority of foodservice jobs, as they are today, dozens of other fields employ foodservice workers as well. Today's major employers will be the same as those in 1995, although some will offer more jobs and some less. Few industries other than separate eating and drinking places will offer over 100,000 foodservice jobs. One will be hotels and other lodging places, offering 502,829 foodservice jobs in 1995, compared with 352,224 jobs in 1982. Another gainer, amusement and recreation businesses other than movie theaters, will require 72,000 more jobs, or a total of 255,543. Nursing and personal care facilities will jump from 138,000 to 248,000, and hospitals will leap from 249,000 to 356,000. Of particular note in the labor scenario of 2000 is the view espoused by many experts that by then labor unions will have significantly loosened their hold in the workforce, if not disappeared altogether. Pointing out that now only about 19 percent of the working population is unionized, compared with a zenith approaching more than half in the 1950s, Corinne Kuypers Denlinger of the Naisbitt Group believes that unions are on their way out.

Furthermore, as heavy industries lose strength in our service-oriented society, the unions' traditional blue collar base is being phased out—by 2000 only about 10 percent of the country's workers will be so classified. "People want to participate in their lives," says Denlinger, "not have decisions concerning their jobs made for them. Unions are becoming inappropriate."—**Rona Gindin**

EMPLOYMENT IN EATING AND DRINKING PLACES*

Total Foodservice Employment** (in thousands)	1982	1995	Percentage Change
Food service workers	6,204	8,221	33
Bakers, bread and pastry	36	46	28
Bartenders	384	505	32
Butchers and meatcutters	191	179	-6
Cooks and chefs	1,211	1,613	33
Cooks, institutional	423	538	27
Cooks, restaurant	351	500	42
Cooks, short order and specialty fast foods	432	570	32
Food preparation and service workers, fast food restaurants	800	1,100	37
Hosts/hostesses, restaurant, lounge, coffee shop	131	178	36
Kitchen helpers	1,000	1,360	36
Pantry, sandwich, and coffee makers	1,000	1,340	34
Waiters and waitresses	1,000	1,340	34
Waiters assistants	1,000	1,290	29
All other food service workers	1,000	1,310	31

** These figures are from the U.S. Bureau of Labor Statistics' Employment Projections for 1995. They include all wage and salary, self-employed, and unpaid salary workers in all segments of foodservice including eating and drinking places, institutional foodservice, retail foodservice, and business industry foodservice.*

and-driving issues, and an older drinking age in many states are pressure to keep alcohol consumption down. It is likely that these restrictions will continue to favor beer and wine consumption at the expense of distilled alcohol. Yet, despite the heightened awareness of alcohol's dangers, many believe that the newly introduced low alcohol beers will not survive. Bob Weinburg, president of R.S. Weinburg and Associates, a market research company covering the brewing industry, says, "I don't think it will catch the health trend. If you're concerned about calories, you don't drink beer at all. Now, a no-alcohol beer, that might catch on."

Marketing

In 15 years, technology is going to afford consumers so many entertainment options that the very concept of a mass market may be obsolete. Cable TV has already ballooned the number of channels available to the average consumer to 20 to 30; when direct satellite delivery into homes becomes possible, that number may go into the hundreds. With consumers fragmented into many small viewing groups, mass marketing loses it punch. The good news is that network television is bound to become less costly. The bad news is that this may not matter because restaurants will have to find new ways to reach their consumers.

Technology will supply some of the answers. Louis Neeb foresees a cable "yellow pages" that viewers can turn to for restaurant information. George Rice believes that some of the consumer shopping techniques now used in hotels will be available on home computers.

Yet, most observers believe restaurateurs will fall back on traditional methods for reaching their customers. Old fashioned print (or its videotext analog) may be the best way to reach the consumers of the future. "Network TV no, spot TV sometimes, direct mail, billboards, and specialty magazines yes," says marketer Richard Good.

Possibly the most powerful marketing in the next century will be that which emphasizes community relations. Local promotions—charity drives, in-store wine tastings, neighborhood newsletters—will be important tools. "Restaurants will work to establish stronger ties with their patrons," says the NRA's Bill Fisher. "They will offer patrons things like their own coffee mugs or their own signature plates, or they'll give away a loaf of bread so the customer will leave with a reminder of the restaurant. 'We want to be your restaurant,' will be the theme."

The personal touch

Saying that customers will demand a more personal experience in a restaurant is easy. The challenge is to find employees who can deliver. "In the front of the house, the emphasis will be on relating to the guest rather than putting down the plate," says Dr. Thomas Powers of the University of Guelph.

The industry is just now seeking out the best ways to train employees. Research underway at the University of New Hampshire strives to define exactly what traits make good servers, and New York University researchers plan to take the results farther and incorporate those findings onto an interactive video disc, so trainees can observe actors making common mistakes and watch the consequences. "Interactive video discs will be used in 2000 to train employees in hard-to-teach interpersonal skills," says NYU's Joseph Durocher.

The introduction of older people into the foodservice workforce will change the texture of training somewhat too. "Because there will be a sprinkling of mature adults in the restaurants, training requirements will be different," says the NRA's Fisher. "Younger people need to learn human relations skills, but older people, who bring that experience with them, need to learn the technical skills.

"Trainers will be more professional in 2000. It is quite likely they will be skilled and schooled with high academic degrees," predicts Fisher. "Training will include stressing the values of the organization and a broader knowledge of the organization," he adds. "It will build in a highly positive experience, which carries over to patrons. There will be less 'Here's the apron; go to work over there.'"

Finding the right people for the front-of-the-house, especially since service will be so crucial to restaurants in 2000, means upgrading the industry's image. "Foodservice will be a respected place to work," Bill Fisher insists, realizing that "It won't be respected for its haute dignity, but instead for being a fun, nice place to work."

Don Smith emphasizes that, especially with the influx of older workers, foodservice facilities will have to change their management techniques. "Good managers will have to realize the extent of their employees' experience, and become a lot less authoritarian," he says. "There will have to be more team involvement." Benefits, too, will have to improve.

And as in the workplace of 2000 as a whole, the climate of many foodservice organizations will change to allow more people at all levels of service to participate in decision-making. Corinne Kuypers Denlinger of the Naisbitt Group suggests that the company of the future will have to rethink its attitude to attract and keep workers during the labor crunch. In some instances, she sees organizations with no titles and no job descriptions: people will make of their jobs what they are capable.

BOH

When *Restaurant Business* asked a number of industry executives to share a "wish list" of equipment for the restaurant of the 21st century, the answers indicated several areas of concern.

● Hud Hinton, director, food & beverage division for Westin Hotels, envisions a kitchen where "each station and piece of equipment performs multiple functions and no individual moves more than three or four feet to complete tasks."

● Bradley Ogden, executive chef at San Francisco's Campton Place Hotel, thinks that a robot capable of chopping, peeling, and dicing would be a tremendous advantage.

● Gayle Ham, director of product development and research for Carl Karcher Enterprises, feels that "we need to uncover ways to automate back-of-the-house activities while providing more personalized service in the front-of-the-house. A robotic piece of equipment capable of assembling burgers, sandwiches and side orders would certainly allow us to do this. The actual cooking of our burgers is currently automated, but preparation of sandwiches and assembly of orders is done manually."

● Bert Paley, vice president/administration, Volume Services Division, Interstate United, wishes that a ductless exhaust system would be developed, combining a fire suppressing system and filtering device within a self-contained hood.

● Norman Rich, vice president, food and beverage, Amfac Hotels, would like to see dicer/shredder attachments built right into the mother unit with only a button to press to activate each component.

● John Farquarson, president of ARA Services' ARASERVE division, believes that every table should have "a sophisticated, small, unobtrusive, electronic method of letting someone know you want something."

● Ernie Renaud, senior vice president, Investors Management Corp., wishes for an oilless french fryer.

Although foodservice—primarily because it is so labor intensive—may have lagged behind some other industries in the realm of technology during past years, there are many indications that is changing.

In fact, technology is one of the most useful ways to think about the future, says Ed Cornish, president and founder of The World Future Society, an association of scientists, scholars, businessmen, and others interested in futurism. According to Cornish, we are now experiencing a revolution in intellectual technology and problem-solving through the advent of telecommunications and computers, and we can expect equally revolutionary developments in the future, particularly in the area of automation and robotics. In some industries, robotics is growing at the rate of 30 percent annually, and by 2000, robots will be affordable in even the small business environment. Cornish envisions the day when "smart machines"—programmable to do a variety of different tasks—will take all the drudgery out of food preparation, mixing batters, trimming steaks, and cutting vegetables. Because of what Cornish calls the "birth dearth," a shortage of workers will impel robotics manufacturers to design machines for very specific tasks.

Martin Cherneff, a consultant to the industry, feels that by the turn of the century such back-of-the-house processes as ordering, inventory, and storage will be completely automated; storerooms will be empowered to "call in" an order directly to a purveyor when they sense that inventory is running low. Although this would perhaps be practical only in larger, centralized facilities, if microcomputers continue the current trend of becoming smaller, more powerful, and less expensive, almost anything may be possible by 2000.

Tom Wiebe, who heads the in-house design department of Cantrex Corp., feels that by 2000, air handling technology to recapture heat will be much improved, and that in general, facilities will be much safer. Interestingly, Wiebe has discovered that what seems like the ideal technical solution to a problem may not necessarily fit in with what consumers want: The company had investigated a sophisticated piece of machinery, intended for large remote operations such as oil fields, that would enable the diner to push-button select various components of a meal, while a computer would see to it that the machine cooked each item to spec. According to Wiebe, the equipment itself worked fine, but the customers wanted none of it; they desired a more personal touch.

Still, there are plenty of less exotic equipment possibilities for the future, many of which are now in development. Most of this equipment

is designed to be more efficient, energy-saving, safe, labor-saving, and/or reliable.

For instance, there is the induction cook top, whereby an induction heater generates a magnetic field over the cooktop so that while the stove itself doesn't get hot, a pot placed on it does.

Another possibility is known as heat pipe technology. Liquid within a closed container is vaporized, and the vapor is then used to heat a cooking surface. Heat is therefore transported from heat source to heat sink with very little temperature loss. Yet another technology is pulse combustion, which is now recognized as a highly efficient way to burn natural gas. In a prototype deep-fat fryer, according to the Gas Research Institute, combustion and heat transfer occur in oval-shaped tubes immersed in the liquid fat. In the cold zone beneath the combustion chamber, food crumbs can accumulate without burning. If a secondary function such as water heating were added, the heat transfer to the water would serve as a secondary heat exchanger. Not exactly the oiless fryer, but a good deal more efficent than the standard vat—in fact, about 80 percent more efficient. The technology also has applications for griddle surfaces.

In the area of refrigeration, the solid state (no compressors or coils) thermoelectric refrigeration system holds great promise. Ultrasonic cleaning, utilizing sound waves to vibrate water molecules, may replace dishwashers. In the near future, most appliances may be able to clean themselves. Remote control cooking is a real possibility, as is the "smart" oven which can sense when something is done and automatically turn off the power source.

As space becomes even more precious, equipment will have to become more and more flexible, routinely performing double or even triple duty. Convection ovens that also utilize steam are already on the market. On the other hand, smaller, more specialized pieces would be highly appropriate for optimum menu flexibility.

In some ways, the future is beginning now for many operators. Consider the pouch or vacuum cooking method now being developed by Hilton International. Fresh, raw food is vacuum-packed in plastic pouches on-premise, making it refrigerator stable for up to six days. The pouches, which can be portioned in any amount from single to banquet-size, are then transferred to a convection steamer for cooking.

The advantages are many, but, most important, product quality is superior. Food cooks entirely sealed in its own natural juices, needing little in the way of salt or sauce. According to Fred Rufe, director of food and beverage, planning and development for Hilton International, the labor saving potential is enormous. For banquets, prep work can be done days ahead; come dinner time, the food is cooked in its pouch and needs only to be plated. For room service, an expensive sous chef is no longer necessary; recipes have been specially developed so that all the ingredients of the dish can be pouched together earlier in the day or the week, for simple cooking and plating at any hour.

"This is not 'boil in bag' quality," points out Rufe. "This is fresh, top quality food packaged and cooked to retain that quality." Indeed, food cooked in this fashion has deep, elemental flavor, which is developed during cooking within a totally sealed container. A whole variety of foods can be vacuum-cooked. Rack of lamb can be pre-browned and then pouched raw, to be cooked to a rare pink in 20 minutes in the convection steamer. Raw prepared vegetables such as julienne carrots can be pouched with chopped shallots and a lump of butter. Or overlapping slices of scallop and zucchini can be arranged in the pouch, to be cooked and served with a watercress sauce which also comes from the pouch. Dieter Hannig, who runs Hilton International's Food Research Center, has developed many such recipes to take advantage of the vacuum cooking concept.

As equipment and technology get more sophisticated, so will support systems. The average kitchen manager may find the inevitable breakdowns that can occur with robotics a little beyond his scope, for example. Bill Eaton, senior vice president of the planning and advisory firm, Cini-Grissom Associates, suggests that by 2000, equipment servicing will have developed to a high art. "Foodservice manufacturers will be concentrating even more on the importance of proper design, warranties, contracts, and training of service staff," he predicts.

Still, while all this is going on, there is some sentiment that a stove will always be a stove, and a pot, a pot. Mark Levy, of Chicago's Levy Organization, sees a major return to the basics in cooking and preparation, with such "antiquated" modes of cooking as the wood grill and the brick oven much in evidence. Erik Erlandsen, manager of food and beverage development for Westin Hotels, concurs, citing age-old techniques of spit roasting, grilling, poaching, and wok cooking as having continued importance, particularly in the year 2000's health-oriented climate.—**Joan Lang**